

New functionality in TREX 1.2

Improved Division Review Functionality.

The current process for Division Reviewers is as follows:

Division Reviewers are set per level 1 division (high level). Once an Authorization is Submitted for Approval, a system generated email is sent to the Division Reviewer(s). The email shows very general information about the document; it does not include specific department or project data. The search page for reviewers is based on the same pieces of information included in the email, making it difficult for reviewers in division with separate groups to find the documents that pertain to their group. The search page lists all Authorizations, the ones pending review as well as those that have already been reviewed, without a clue of how to differentiate them. Also, for Division Approvers of Foreign trips, there is no quick way to verify that a Division Budget Reviewer has looked at the document and verified proper funding.

Sample of current email:

Subject: An authorization is ready for your division review.
From: fms-logmail@mailbot.lbl.gov
Date: 7/10/2008 10:29 AM
To: APecoraro@lbl.gov

An authorization is ready for your division review.

Traveler : Morales,Alejandro ID: 398803
Arranger : Kooyman,Nieves T
Trip Name : Australia
LBNL Trip # : 000060523
Travel Auth ID : 0000020393
Total Amount : \$3187.25
Begin Date : 11/01/2008 End Date: 11/11/2008
First Business Location: MELBOURNE,AUS
Business Purpose : Conference

<https://trextrn.lbl.gov/bsc/trextrn/ZT TRAVEL/ERP/c/LBNL TE.ZT DIV REVIEW.GBL?Page=ZT TRIP LEG INFO&Action=U&REFERENCE ID=000C>

In TREX v1.2 this functionality has been improved to include the project id and 4 level department id in the email that the reviewers receive and in the reviewer's search page. The search page allows obtaining a separate list of Authorizations pending review or the list of those that have been reviewed. It is now required to populate the *Division Review* field. (Free text 8 characters) A box has been added in the reviewer's page for comments. The reviewer's comments are visible to the Division Approver.

Sample of new email:

Subject: TESTING FMSQA:An authorization is ready for your division review.
From: fms-logmail@mailbot.lbl.gov
Date: 10:49 AM
To: APecoraro@lbl.gov

An authorization is ready for your division review.

Traveler : Reed,Harry
ID : 736267
Arranger : Pecoraro,Aurora
Trip Name : Div Review TREX 1.2
LBNL Trip # : 000063811
Travel Auth ID : 0000022230
Total Amount : \$3,712.00
Begin Date : 01/10/2009
End Date : 01/15/2009
First Business Location: BARCELONA,ESP
Business Purpose : Site Visit
Project ID : UC7694
Dept ID : AFCB

<https://fmsrvq.lbl.gov:8001/psp/fmsqa/EMPLOYEE/ERP/c/LBNL TE.ZT DIV REVIEW.GBL?Page=ZT TRIP LEG INFO&Action=U&REFERENCE ID=000>

Division Budget Review search page:

The Division Reviewed box empty will pull Authorizations Pending review.

The Division Reviewed box checked will pull Authorizations already reviewed.

Division Budget Reviewers will receive an email when an Authorization is sent back for revision and will be notified again when the Authorization is re-submitted. The only caveat is that the second time the search for the Authorization should be under the *already reviewed* documents.

The Division Reviewer page defaults to the Div. Reviewer's Level 1 Division (two character div code) based in his/her own organization in the Project Deptid field, but this value can be changed.



Division Review

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

LBNL Trip #:

begins with

Project Deptid:

begins with

CF

Division Reviewed

☐

Trip Name:

begins with

Begin Date:

=

31

End Date:

=

31

Expense Location:

begins with

Search

Clear

Basic Search

Save Search Criteria

Division Review

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

LBNL Trip #:

begins with

Project Deptid:

begins with

AFCB

Division Reviewed

☐

Trip Name:

begins with

Begin Date:

=

31

End Date:

=

31

Expense Location:

begins with

Search


Clear

Basic Search

Save Search Criteria

Division Budget Reviewers also receive an email when an Authorization is Canceled, in order to provide information for budget adjustments.

Division Budget Review page:



Review By Division Designee

Trip Information

Traveler

Reed,Harry

736267

Phone

510486-4130

Mall Stop

937R0600

HR Org

OP

Arranger

Pecoraro,Aurora

Phone

510486-6439

Mall Stop

937R0600

HR Org

OP

LBNL Trip #

000083811

Travel Auth ID

0000022230

Report ID

Begin Date

01/10/2009

End Date

01/15/2009

Business Purpose

Site Visit

Trip Type

Foreign

Project Information

Project	Primary	Percentage Split	SW Classification	Project Org	MAIS Code
1 UC7694	<input checked="" type="checkbox"/>	100.00	KA1102053	AFCB	OPEXP

Division Review

Travel Auth Status

Division Reviewer Comments

OK - AP

Submitted

Review completed. Trip funded. Please approve.

☐ Trip Duration < 24 Hours

☐ One-Way Trip

Itinerary Legs

Departure Date	Departure City, State or Country	Arrival Date	Business City, State or Country	Number of Nights at Location	Number of Personal Days	Per Diem - MAIS	Per Diem - Lodging	Actual MAIS	Actual Lodging	Use Actual MAIS?	Use Actual Lodging?
1 01/10/2009	BERKELEY,CA	01/10/2009	BARCELONA,ESP	5		134.00	260.00			<input type="checkbox"/>	<input type="checkbox"/>
2 01/15/2009	BARCELONA,ESP	01/15/2009	BERKELEY,CA			134.00	260.00			<input type="checkbox"/>	<input type="checkbox"/>

Trip Description and Benefit

Div Review TREX12


Trip Comments:

Travel Authorization Estimate

MSJE	737.00	+Lodging	1,300.00	+Misc	1,000.00	=Total Non-Air	3,037.00
						Total Air	675.00
Paid By Others (informational Only)						Total Amount	3,712.00

Division Review Completed

Division Approver's Page:



Approve Travel Authorization

Travel Authorization Summary

Harry Reed Employee ID: Travel Auth ID: 0000022230

General Information

Trip Name: Div Review TREX 1.2 LBNL Trip #: 000063811
Begin Date: 01/10/2009 End Date: 01/15/2009 Trip Type: Foreign
Business Purpose: Site Visit Status: Submitted
DOE Subcontractor ☐ DOE Subcontract#

Trip Description and Benefit Trip Comments
Div Review TREX 1.2

Project Information [Customize](#) | [Find](#) | [First](#) 1 of 1 [Last](#)

	Project	Primary	Percentage Split	B +R Classification	Project Org	MAR S Code
1	UC7894	<input checked="" type="checkbox"/>	100.00	KA1102053	AFCB	OPEXP

Itinerary Legs [Customize](#) | [Find](#) | [First](#) 1-2 of 2 [Last](#)

	Departure Date	Departure City, State or City, Country	Arrival Date	Business City, State or City, Country	Number of Nights at Location	Number of Personal Days
1	01/10/2009	BERKELEY, CA	01/10/2009	BARCELONA, ESP	5	
2	01/15/2009	BARCELONA, ESP	01/15/2009	BERKELEY, CA		

Travel Authorization Estimate

M&IE	737.00	+ Lodging	1,300.00	+ Misc	1,000.00	= Total Non-Air	3,037.00
						Total Air	675.00
Paid By Others (Informational Only)						Total Amount	3,712.00

Total Travel Authorization: 3,712.00 USD [History](#)

Travel Authorization Status

Routing	Name	Approval Status	Date
Originator	Pecoraro, Aurora	Submitted	01/28/2009
Division Approver 1	Gourlay, Stephen A		

Approval Detail [Find](#) | [View All](#) | [First](#) 1 of 1 [Last](#)

Name: Gourlay, Stephen A
Comment:

Division Reviewer Comments

Review completed. Trip funded. Please approve.

[Approve Request](#) [Send Back for Revision](#)

* Required Field
[Book Travel - CliqBook](#) [Sign up for UC Travel Insurance](#)

[View Worklist](#) [Previous in Worklist](#) [Next in Worklist](#) [Notify](#)